



THE H.E.A.R.D. PATIENT ADVOCACY WORKSHEET

Prepare your story. Ask clear questions. Leave with a plan you understand.

H.E.A.R.D. is a structured way to prepare for a medical visit and keep the conversation anchored to your actual symptoms, changes, questions, and next steps. Use what is useful; skip what is not.

1 • PREPARE BEFORE THE VISIT

BRING BACKUP

A trusted person can listen, take notes, help you remember questions, and support you if the visit becomes overwhelming.

TRACK THE PATTERN

Note when symptoms happen, how long they last, what makes them better or worse, and what has changed from your baseline.

BRING THE FACTS

Have your medication list, major diagnoses, relevant results, and a short timeline ready. You do not need to bring every record you have.

MY SYMPTOM SNAPSHOT Use plain words. Patterns and changes are often more useful than perfect medical terminology.

SYMPTOM + WHEN IT STARTED	FREQUENCY / TRIGGERS / PATTERN	WHAT I WANT TO ASK
<i>e.g., Right-sided chest and shoulder pain</i>	<i>e.g., Cyclical; worse with deep breaths</i>	<i>e.g., Could these symptoms be connected?</i>

WHAT I MOST NEED FROM THIS VISIT A diagnosis? A safer plan? A referral? Better symptom control? Understanding what happens next?



2 · USE H.E.A.R.D. IN THE CONVERSATION

 These are prompts, not a script you have to recite word-for-word.**H****HONOR THE POSSIBILITY**

Acknowledge a possible explanation without giving up the rest of the question.

TRY: "I understand that [preliminary diagnosis] can cause [symptoms], and I agree those are worth addressing. I also want to make sure we are considering other possibilities so we have the whole picture."

MY NOTES: _____

E**EXPLAIN WHAT IS DIFFERENT**

Anchor the discussion to what is new, changing, specific, or patterned.

TRY: "What worries me is that this is different from my usual baseline because _____."

MY NOTES: _____

A**ASK WHAT HAS BEEN RULED OUT**

Ask what the current evaluation does - and does not - tell you.

TRY: "What important conditions have we ruled out so far, and what would make you investigate further?"

MY NOTES: _____

R**REQUEST A PLAN**

Leave knowing the next step, timeline, and who owns each piece.

TRY: "What is the plan from here, when should I expect improvement or results, and when should we reevaluate?"

MY NOTES: _____

D**DOCUMENT THE DECISION**

Make sure your symptoms, plan, and follow-up are accurately captured.

TRY: "Could we make sure the chart reflects the symptoms I reported, the plan we agreed on, and when I should follow up?"

MY NOTES: _____

3 · BEFORE YOU LEAVE

 Being heard does not always mean hearing "yes." It does mean understanding the reasoning and the plan.

☐ I understand what we think is happening.

☐ I know what happens next.

☐ I know when to follow up.

☐ I know what should make me seek care sooner.